

OTHER COURSES (NOT OF APPRAISAL NATURE) ACCEPTED FOR APPRAISER TRAINING CREDIT

Effective July 1, 2008

On April 2, 2008, Board of Equalization staff and the California Assessors' Association Education Committee met to discuss several matters relating to the training and certification program. One of those items was to establish a criterion for "other courses" (not of an appraisal nature) that would be accepted for appraisal training credit. The goal was to provide clear guidance on what types of classes constitute acceptable training within the statutory framework (training designed to enhance or maintain the competency of a person certified by the State Board of Equalization to perform the duties of an appraiser for property tax purposes.) On April 24, 2008, the matter was presented to the California Assessors' Association Executive Committee and specific criteria were adopted.

Background

Revenue and Taxation Code section 671 states that: "In order to retain a valid appraiser's certificate [or advanced appraiser's certificate] every holder shall complete at least 24 [or 12] hours of training conducted or approved by the State Board of Equalization in each one-year period." Further clarification of what constitutes approved training can be found within the "Approval and Determination of Training Hours Credited for Formal Courses" and "Approval and Determination of Training Hours Credited for Other Training" sections of BOE's *Guidelines for Appraiser's Certification and Training* ([LTA 2003/068](#) pages 7 -9). The guidelines provide for five categories of formal courses: Appraisal Courses, Nonappraisal Real Estate Courses, Accounting and Auditing Courses, Other Courses, and Seminars and Workshops. One of the categories is as follows:

Other Courses "Approval may also be considered for other nonappraisal courses, including computer courses that do not fall into the aforementioned categories, if such courses are relevant to the appraiser's assigned or prospective duties.

"Courses in management, business administration, supervision, or public administration may be approved if the appraiser's job duties include management or administration. However, only 25 percent of the appraiser's annual training requirement can include this type of instruction...".

Acceptable Course Types for Other Courses (nonappraisal courses)

The following four course types are acceptable for appraiser training recognition:

1. Spreadsheet programs, such as Microsoft Excel, where the computer software in question is in fact the foundation for an appraisal tool required to be used by the appraiser.
2. Database programs, such as Microsoft Access or MegaByte, where the computer software in question is in fact the foundation for an appraisal tool required to be used by the appraiser.
3. Geographic Information System (GIS) programs, such as ArcGIS or Pictometry, where the computer software in question is in fact the foundation for an appraisal tool required to be used by the appraiser.
4. Appraiser Ethics. The class must directly pertain to appraiser ethics and does not apply to general ethics or conflict of interest classes.